

D R A F T

USW New Officer Training

Facilitator's Guide



FACILITATOR'S GUIDE:

New Officer Training

Total Time: 6.5 Hours

Planning Required:

1. Arrange for audio-visual support (have projector and screen available and know how to connect and operate all equipment) though use of power point is optional.
2. Prepare for large group discussion and small group exercises using flip charts and hand-outs.
3. Contact the USW Local Union Services department to secure sufficient copies of the USW International Constitution (IC) and Standard Local Union By-Laws (SLB) and Standard Amalgamated Local Union By-Laws (SALB) for all participants.
4. Notify participants in advance of the need to bring their own local by-laws where such by-laws apply.

Materials Needed:

- Sufficient copies of USW New Officer Training Participant Workbook
- Sufficient copies of the IC and SLB and SALB for all participants.
- Sufficient copies of handouts (Order of Business Form E-110 plus sample reports from Recording Secy., Financial Secy., Treas., and WOS Call Letter).
- Computer and/or projector and screen if power point is to be included.
- Flip charts, markers, and masking tape.

Room Step-Up:

- Round tables of 5-8.
- Walls suitable taping up flip chart paper.
- Front table to do simulated membership meeting.

NOTE: Throughout the Workshop you will be directing participants to answer and discuss questions based on any one of up to five governing documents – the IC, the SLB, the SALB, the participant's own local by-laws, and the participant's collective bargaining agreement. To make things easier, direct those participants who belong to amalgamated locals to use the SALB as their primary reference and everyone else to use the SLB for theirs. For the most part these two documents have identical language, articles, sections, and subsections with respect to local union governance issues. For those questions that apply to unit governance, all the participants will have to refer to the SALB in order to answer the questions. Session 4 will ask participants a series of questions based on their local's own by-laws (assuming they have them) or any past practices their local has followed to "fill the gaps" in the SLB and SALB. For this session participants should refer to their own by-laws.

Lastly, instructors/facilitators should keep in mind that some participants may be governed by local union by-laws that are a holdover of the local's once having been affiliated with PACE, which merged with the USW in 2005. Under the merger agreement former PACE locals are allowed to continue a number of practices contrary to the USW's governing documents, including their local union officer structure, but starting in 2012 any changes to such by-laws will have to be in accordance with the USW International Constitution and By-Laws.

Session 1: Workshop Objectives, Agenda, Ground Rules & Introductory Exercise

- **Teaching Style:** Lecture, individual exercise, and large group discussion.
- **Time Needed:** 30 minutes
- **Materials Needed:** Flip chart, markers, masking tape, Participant Workbook.
- **Goal:** That participants understand objectives, agenda, & ground rules for the workshop and that they share with each other their names and background as well as what motivated them to become union leaders.

Steps:

1. Introduce yourself and welcome participants to the one-day new officer training.
2. Explain breaks and meals and location of rest rooms.
3. Confirm participants have all the materials you'll be using for the workshop (Participant's Workbook, USW Constitution, Standard Union By-laws, Standard Amalgamated By-Laws, and/or own Local Union By-laws).
4. Have participants open Workbook to review Workshop Objectives and Agenda.
5. Read aloud each objective and ask for any questions after all objectives have been read.
6. Quickly review agenda, adding any clarifying information regarding the subject matter of each session.
7. Review the Workshop Ground Rules. Possible talking points:
 - *Participate – This workshop will involve a series of small group exercises and large group discussions so to get the most out of the workshop we encourage you to participate and share your opinions and experiences with the other participants. We all have a lot to learn from each other.*
 - *One Conversation at a time – In order for the large group discussions to be productive it's important that we have one conversation going at a time, and not one main one and a bunch of side-bar discussions. It's not fair to the people who*

are trying to follow the large group discussion to have other conversations happening around them. It also makes it difficult for me to facilitate the main discussion.

- *Respect other viewpoints – Much of what we'll be talking about touches on areas that require you to exercise your judgment as a union leader. What might make sense for one local union membership may not for another. This means that there's not always a right or wrong answer to some of these issues. For that reason I encourage you to feel free to disagree with me or any of the other participants if you have a different perspective, but please do it in a respectful way so that we can learn from these different perspectives.*
 - *Return on time from breaks – As I said, we'll be taking a number of breaks throughout the day. When we do I would ask you to please return on time from those breaks. We have a lot to cover and probably not enough time to cover it all.*
 - *Mute cell phones – Finally, please turn off or mute your cell phones. It's very distracting to have cell phones go off in the middle of the class.*
8. After reviewing the Ground Rules ask the group, "Is everyone okay with these ground rules?" After a short pause, hearing no objections, post the ground rules somewhere in the room.
 9. Review the Introductory Exercise and answer any questions from participants who are unclear about the exercise. After about four minutes give the participants a one-minute warning before starting the large group discussion.
 10. Go around the room asking participants to introduce themselves and share the one word they chose to describe why they decided to become a local union officer. Record each word on a flip chart. If the group is relatively small (less than 10 participants) you may want to ask each participant why he or she chose that particular word. When the list is complete, post it somewhere in the room and ask participants if they see any particular pattern or what occurs them looking at the words listed. Feel free to offer any observations of your own, particularly if you see connections between the words and the grassroots democracy discussion you'll be leading in the next session.

Session 2: Our Structure Reflects Our Values

- **Teaching Style:** Lecture, small group exercise, & large group discussion.
- **Time Needed:** 30 minutes
- **Materials Needed:** Flip chart, markers, Participant Workbook.
- **Goal:** That participants be able to accurately describe the democratic, grassroots nature of USW's local union structure based on the USW's governing documents and how this structure is essential to democracy in our country's political and economic life.

Steps:

1. Read aloud (or present from your own outline) material on pages 5 and 6 of the Workbook describing USW's governing documents which include the International Constitution, Standard Local Union By-Laws, and the Standard Local Amalgamated Union By-Laws, along with collective bargaining agreements and policies or manuals issued under the authority of the IEB as well as applicable resolutions from the International Constitutional Convention or any of the USW's various sector conferences. **BOTTOMLINE: THESE ARE THE DOCUMENTS ON WHICH YOUR AUTHORITY AS LOCAL UNION OFFICIALS RESTS AND TO WHICH YOU SHOULD REFER FOR GUIDANCE ON ANY LOCAL UNION GOVERNANCE ISSUES. AND AS WE'LL DISCUSS LATER, YOU ARE CHARGED WITH ENFORCING THESE.**
2. Explain that the IC serves as the Constitution for all USW Locals and that the SLB will apply to those locals that are stand-alone and that the SALB will apply to those that are amalgamated.
3. Ask how many participants belong to a local that has supplemented the standard by-laws with their own by-laws. Explain that this will be the subject of Session 4 and that this document – your own local's by-laws – is the equivalent of the Standard Local Union or Standard Amalgamated Local Union By-Laws.
4. Refer participants to page 7 (How A Stand Alone Local Union Works) and review the structure of a USW Local Union explaining that . . .
 - THE decision-making body is the regular membership meeting.
 - The various local union officer titles (including the elected Grievance Committee "positions"), all of which serve three-year terms.
 - The mandated or "standing" local union committees.
 - The way in which rank-and-filers participate in the life of the local often through committees (standing and/or "special").

5. Refer participants to page 8 (How An Amalgamated Local Union Works) and ask participants if anyone knows the definition of an amalgamated local. Regardless the answer, refer participants to page 6 of the SALB and read aloud the definition:

AN "AMALGAMATED LOCAL UNION" IS DEFINED AS A LOCAL UNION WHOSE MEMBERS ARE EMPLOYED BY THE SAME OR DIFFERENT EMPLOYERS IN MORE THAN ONE BARGAINING UNIT WITHIN A SINGLE DISTRICT OF THE INTERNATIONAL UNION OR, WITH THE APPROVAL OF THE INTERNATIONAL EXECUTIVE BOARD, IN MORE THAN ONE DISTRICT. EACH SUCH BARGAINING UNIT IS HEREINAFTER REFERRED TO AS A "UNIT."

6. Return to page 8 and review the structure of a USW Amalgamated Local Union explaining that . . .
 - As with the stand-alone USW local union structure, THE decision-making body of a USW Amalgamated Local Union is the regular membership meeting. Units may hold their own unit membership meetings but these WILL NOT have the decision-making authority of the Local Union's membership meeting.
 - The local union officer titles are the same HOWEVER rather than a local-wide grievance committee amalgamated locals have at least one Unit Griever elected for each unit who also serves a 3-year term.
 - As with the regular USW local union structure, there are mandated or "standing" local union committees but these can be established either as local-wide committees with representation from each of the units or the local president may consult with each Unit Chair to establish such committees on a unit basis.
 - As with the stand-alone USW local union structure, the principal way in which rank-and-file participate in the life of the local is often through committees (standing and "special"), again, either at the local or unit level.
7. Refer participants to page 9 to quickly view the amalgamated unit structure (you may want to ask how many participants from amalgamated locals hold unit positions in addition to a local officer title) and again emphasize that regular unit membership meetings are OPTIONAL and that decision-making authority still rests with the local union membership meeting.
8. Review the instructions for the Small Group Exercise on Page 10. Assuming the room is setup in rounds, have participants work in the groups they've self-selected. If not in rounds, form small groups based on groups of 3-5 participants.
9. Read aloud the excerpt from Lynn Williams' memoir. Before having participants start on the exercise check-in to be sure everyone understands what Williams is referring to when he writes of "a modern state" (that is, a country or nation, in our case, the United States). Make clear that Williams is assuming that as citizens we want our country to be democratic, meaning governed for and by the people. If that's the case, then he thinks

the country needs a “free, strong, participatory” labor movement. The exercise is asking the participants to discuss whether the USW local union structures we’ve just outlined lives up to, or is consistent with, the values of a free, strong, participatory labor movement. ALLOW 10 MINUTES FOR SMALL GROUP DISCUSSIONS AND GIVE A TWO-MINUTE WARNING BEFORE STARTING LARGE GROUP DISCUSSION.

10. Facilitate a large group discussion by asking for volunteers to share what was discussed in their small groups (formal report backs aren’t necessary). Listen for . . .
 - Opportunities to connect the earlier single word descriptions of why participants decided to become union leaders (these should be posted somewhere in the room) to comments regarding the democratic nature of the USW local union structure and the referendum election process for electing leaders at every level of the Union.
 - Participants’ comments as they relate to the “bottom-up” or “grassroots” nature of governance that is based on the regular membership meeting being the body for local decision-making. Stress that this will become important to keep in mind when we get to Session 5 on effectively managing local union membership meeting.

Session 3: That's the Job: Knowing Our Officer Duties and Managing the Local or Unit

- **Teaching Style:** Two small group exercises & two large group discussions.
- **Time Needed:** 120 minutes.
- **Materials Needed:** Participant Workbook, IC, SLB, and SALB.
- **Goal:** That participants demonstrate an understanding of the duties assigned to the various officer titles and unit positions as well as some basic guidelines for managing the local or unit based on the International Constitution and applicable local by-laws.

Steps:

1. Review the instructions for the Small Group Exercise: That's My Job on Page 11. Assuming the room is setup in rounds, have participants work in the groups they've self-selected. If not in rounds, form small groups based on groups of 3-5 participants.
2. Explain to participants that everyone is to list all the duties for each of the officer titles/unit positions so that everyone has an understanding of each other's roles and responsibilities.
3. After 40 minutes (including a two-minute warning) review answers provided in the answer key making sure to have participants look at specific article, section, subsection of the appropriate governing document. Best method may be to review each duty and list all the officials who share that duty (see power point slides to see how this can be done).
4. Review the instructions for the Small Group Exercise: Can You Do That? on Page 15.
5. After 30 minutes (including a two-minute warning) review answers (along with some related talking points) provided in the answer key making sure to have participants look at specific article, section, subsection of the appropriate governing document.

Answer Key for Small Group Exercise: That's My Job

President – Duties include . . .

No. 18 per Art. V, Sec. 5(a) of SLB & SALB;
No. 6 per Art. V, Sec. 1(b) of SALB & SALB;
No. 8 per Art. V, Sec. 1(a) of SLB & SALB;
No. 10 per Art. V, Sec. 1(c) of SLB & SALB;
No. 12 per Art. V, Sec. 1(a) of SLB & SALB;
No. 14 per Art. V, Sec. 1(c) of SLB & SALB;
No. 15 per Art. V, Sec. 10 of SLB & Sec. 11 of SALB;
No. 16 per Art. V, Sec. 1(c) of SLB & SALB.

[NOTE: Duties 15 & 16 are also referred to in Art. V, Sec. 9 of the SLB and in Sec. 10 of SALB but are not assigned to any one officer or position, but instead generally to "this Local Union."].

Vice President – Duties include . . .

No. 7 per Art. V, Sec. 2 of SLB & SALB.

Financial Secretary – Duties include . . .

No. 18 per Art. V, Sec. 5(a) of SLB & SALB;
No. 4 per Art. V, Sec. 4(a) & (e) of SLB & SALB;
No. 11 per Art. V, Sec. 4(a) of SLB & SALB;
No. 14 per Art. V, Sec. 4(a) of SLB & SALB;
No. 15 per Art. V, Sec. 10 of SLB & Sec. 11 of SALB.

Treasurer – Duties include . . .

No. 18 per Art. V, Sec. 5(a) of SLB & SALB;
No. 14 per Art. V, Sec. 5(b) of SLB & SALB;
No. 15 per Art. V, Sec. 10 of SLB & Sec. 11 of SALB;
No. 19 per Art. V, Sec. 5(b) of SLB & SALB.

Recording Secretary – Duties include . . .

No. 13 per Art. V, Sec. 3(a) & (b) of SLB & SALB;
No. 14 per Art. V, Sec. 3(a) of SLB & SALB.

Trustee – Duties include . . .

No. 1 per Art. V, Sec. 8 of SLB & SALB.
No. 5 per Art. V, Sec. 8 of SLB & SALB;



No. 14 per Art. V, Sec. 8 of SLB & SALB.

Guide – Duties include . . .

No. 2 per Art. V, Sec. 6 of SLB & SALB.

Guard – Duties include . . .

No. 21 per Art. V, Sec. 7 of SLB & SALB.

Unit President – Duties include . . .

No. 3 per Art. V, Sec. 9(a) of SALB;

No. 14 per Art. V, Sec. 9(a) of SALB;

No. 17 per Art. V, Sec. 9(a) of SALB.

Unit Secretary – Duties include . . .

No. 20 per Art. V, Sec. 9(b) of SALB;

No. 14 per Art. V, Sec. 9(b) of SALB.

Unit Griever – Duties include . . .

No. 9 per Art. V, Sec. 9(c) of SALB.

No. 14 per Art. V, Sec. 9(c) of SALB.

Answer Key for Small Group Exercise: Can You Do That?

1. You and your fellow local union officers decide that due to poor attendance at the recent monthly local union membership meetings going forward you're going to have two membership meetings per year. Can you do that? Why or why not?

No, you can't do that. Per Article VII, Section 1 of both the SLB and the SALB a general membership meeting must held at least once a month. The only exception is that with the approval of your district director you may hold meetings less often but no less than every three months.

2. You and your fellow unit officials decide that due to poor attendance at the recent monthly unit membership meetings going forward you're going to have two unit membership meetings per year. Can you do that? Why or why not?

Yes, you can do that. Article VII, Section 3 of the SALB states that a unit "may" (as opposed to "shall") hold regularly scheduled membership meetings.

3. Your local union's Financial Secretary recently resigned and the Local President has permanently appointed the Chair of the Grievance Committee to take her place. Can he do that? Why or why not?

No, he can't do that. According to the SLB a vacancy that occurs during any officer (except President) or grievance committee member's term can be filled one of two ways: per Article V, Section 1, Subsection (d)(1) the vacancy can be filled through a majority vote of the remaining local officers; or per Article V, Section 1, Subsection (d)(2), the President can appoint a member to fill the vacancy until an election by the membership to be held no later than two months following the occurrence of the vacancy. Note that Article IV, Section 2 of both the SLB only precludes holding multiple officer titles, NOT serving as both a local officer and a Grievance Committee member.

4. Your Local Financial Secretary recently took an extended leave of absence to attend to a pressing family matter. As the Executive Board you decide to share her duties until she returns. Can you do that? Why or why not?

No, you cannot. Per Article Article V, Section 1, Subsections (d)(3) and (d)(5) of both the SLB and the SALB a "temporary acting" replacement for your Financial Secretary will have to be selected by a majority vote of the remaining officers.

Subsection (d)(6) expressly prohibits temporarily sharing the duties of the temporarily absent officer.

5. Rather than submit the light, heat, and rent bill for your local union hall every month to your Recording Secretary for a recorded motion and approval by the membership at your monthly meeting, your Treasurer prepares an annual budget at the start of the year. The Treasurer submits that budget for a recorded motion and approval of the membership. This way these regular expenses get paid immediately as they come due. Can you do that? Why or why not?

Yes, you can do that. Per Article V, Section 5(d) of both the SLB and the SALB recurring standard bills may be paid by the Treasurer on a single authorization by the Local Union to pay such bills when due.

6. Your Local President runs a small office cleaning business in addition to his full-time job and you've recently found out that his company has a contract with your employer to clean several of its offices. The Local President says this is not a conflict of interest because the Local does not represent the employer's custodial staff. Can he do that? Why or why not?

No, he can't do that. Per Article V, Section 11(b) of both the SLB and SALB (see 2008 Changes to Standard By-Laws (Including Amalgamated Local Unions)) local union officials (which would include local union officers, grievance committee members, and unit officials) should not own or have a substantial business interest in a business enterprise that buys, sells, or otherwise deals with an employer. The fact that the local in question does not represent the employer's custodial staff is irrelevant.

7. One of your members recently approached you to say that she intends to make a motion at your next membership meeting to amend the current by-laws to establish elected negotiation committees at the unit level (this is an amalgamated local). Can USW locals effectively amend by-laws in this manner? Why or why not?

No, in order to effectively alter its by-laws a local must comply with the process set forth under Article XIX of both the SLB and SALB, meaning that passage of the member's motion alone will not be sufficient. It will first have to be approved by the International Union and then submitted in writing at two consecutive Local Union meetings and approved by a two-thirds majority vote of the members present at the next regular meeting.

8. Your local's Guide recently informed the Executive Board that she recognized several former members in attendance at your last membership meeting who were laid-off by your employer twelve months ago and remain on the employer's recall list, though she believes all of them have found work elsewhere. She believes these folks should not be allowed to attend future membership meetings until they've been recalled. Can the Local bar these folks from attending future membership meetings? Why or why not?

No, it cannot. Per Article VIII, Section 5 of both the SLB and the SALB, these laid-off members would remain members in good standing until 24 months have passed (assuming they have not worked five days or more of work in any one month during this period, in which case they could continue in good standing).

9. At your local's monthly membership meeting, prior to local elections, your current Recording Secretary is nominated for both her current position and that of Vice President. She accepts both arguing that she should not have to decline either until she knows who else has accepted nomination to either office. Can she do that? Why or why not?

No she cannot. Per Article IV, Section 2 of both the SLB and the SALB, she can neither hold nor be a candidate for more than one local officer title. However, she need not immediately accept both nominations and may choose the one she'd like to run for within the time limit prescribed by the local by-laws.

If this were an amalgamated local and she were nominated to her current office and that of Unit Griever for her unit, could she accept both nominations? Why or why not?

Yes, she could. Article IV, Section 2 applies only to local officer titles. Local union membership meeting attendance requirements (assuming a local chooses to enforce them—see note below) apply only to local union officers and grievance committee positions and not to unit positions.

How about if she had missed all the unit's monthly membership meetings over the last two years but had attended two-thirds of her local union's meetings?

In the case of a member running for a unit position, the fact that she has not attended a regularly held unit membership meeting over the last two years would only render her ineligible if she had also failed to meet the local membership meeting requirements for a local officer title. Per Article IV, Section 6(c) of the SALB, only if a member fails to meet the local membership

meeting requirement can his or her eligibility for a unit position hinge on having attended 1/3rd of the Unit membership meetings in the last 24 months.

Note: Some meeting attendance requirements that determine eligibility for local union office have been held to violate the 1959 Landrum-Griffin Act based on their being "unreasonable" because they disqualify a large portion of the local's membership from candidacy. Locals should bear this in mind if they choose to enforce such eligibility requirements. The USW's unit meeting requirement for members wishing to run for unit positions where the unit in question does hold regularly monthly meetings must be followed because these are deemed not to violate the federal law.

10. Under your local's by-laws, the Executive Board is to consist of the Local President, Vice President, Recording Secretary, Financial Secretary, Treasurer, three Trustees (because your local's membership is less than 100, your by-laws combine the duties of Guide and Guards with the Trustee title) and the Chair of your Grievance Committee who also happens to be your Local President. Can the President occupy two seats on the Executive Board, and if so, how many votes does she get?

Yes, she can. The prohibition against holding more than one local union officer position under Article IV, Section 2 of both the SLB and the SALB does not include the Grievance Committee position (in the case of stand-alone locals) or Unit Griever position(s) (in the case of amalgamated locals). An executive board therefore could include a member who occupies two seats, but this member would only be allowed one vote.

Session 4: Where the Rubber Meets the Road: Local Union By-Laws

- **Teaching Style:** Lecture, small group exercise & large group discussion.
- **Time Needed:** 30 minutes
- **Materials Needed:** Participant Workbooks and/or own Local By-Laws.
- **Goal:** That participants demonstrate an understanding of the supplements that have been made to the applicable standard by-laws as reflected in the set of by-laws that their particular local has adopted.

Steps:

1. Read aloud (or present from your own outline) material on pages 20 and 21 of the Workbook describing the process through which USW stand alone or amalgamated locals may tailor their by-laws to meet the needs of their particular membership by supplementing the SLB or SALB.
2. Direct participants to the requirements for supplementing or “amending previous additions” under Articles XVIII and XIX of the SLB and SALB.
3. Ask how many participants belong to locals that have adopted their own by-laws and whether they’ve brought them to the training. Explain to participants that those locals that have not adopted their own by-laws will discover gaps in the SLB or SALB that will likely have been filled through “past practice” (in the same manner that past practice often fills gaps in a collective bargaining agreement). One example: the number of Grievance Committee Members a local elects or the number of Unit Grievors that a unit of an amalgamated local elects.
4. Review the instructions for the Small Group Exercise: According to My By-Laws on Page 21. Assuming the room is setup in rounds, have participants work in the groups they’ve self-selected provided participants from the same local unions work together. If not in rounds, form small groups based on groups of 3-5 participants, again based on shared locals. If they believe they have their own by-laws but are without a copy then they should answer the questions the best they can. Participants who are attending alone and aren’t sure of whether their local has its own by-laws (or are without a copy) can work with those who’ve brought their own by-laws to get a sense of the type of supplements locals adopt. **STRESS THAT WITHOUT A COPY OF YOUR LOCAL UNION’S BY-LAWS YOU WILL BE UNABLE TO KNOW WITH CERTAINTY THE ANSWERS TO THESE QUESTIONS.**

5. In the large group discussion call on different groups to volunteer their answers and, where possible, ask them to cite the part of their own by-laws that provide the answer, or the part of their collective bargaining agreement should it be a supplemental source (for example, the c.b.a.'s grievance procedure may establish the number of grievance committee people or the role of shop stewards at initial steps of the grievance procedure).

Session 5: Union Democracy In Action: Effectively Managing Local Union Meetings

- **Teaching Style:** Lecture and large group role-play and discussion.
- **Time Needed:** 105 minutes
- **Materials Needed:** Participant Workbooks, front table and gavel.
- **Goal:** That participants demonstrate an understanding of how to use a suggested set of rules of order to manage a regular local union membership meeting in a way that allows for healthy participation from the floor while also moving efficiently through the local's order of business.

Steps:

1. Read aloud (or present from your own outline) the material on pages 24 through 29 of the Workbook that describes "Ten Suggested Rules of Order" to use for managing a local membership meeting. Note that none of the USW's governing documents require any particular rules of order be used, but that it is recommended that locals use some form of parliamentary procedure. Stress also that the rules used should not be overly technical but be consistent with the previously discussed values of a free, strong, participatory labor movement (more on this later). One point for discussion: Should the Chair participate in votes and/or debates? Recall that the President has the deciding vote "when members are equally divided," but nonetheless may only vote once.
2. Refer participants to page 80 of the IC (titled "Manual") which has a full description of the "Order of Business For Conducting A Local Union Meeting." Distribute "Order of Business Form E-110."
3. Review each component of the agenda as listed in the handout and described in the IC.
4. Walk participants through flow chart in Workbook on page 30. Take out your gavel and model how you would chair such a meeting to move the business along, for example:

"So after the Recording Secretary has read the minutes, then I would ask the membership, 'Are there any corrections? Hearing none, I'll entertain a motion to accept the minutes as read.' [Prod a participant to say, 'I so move']. Is there

a second? [usually un-prodded, someone will yell, "second"]. All those in favor say "aye." Opposed, "nay." Motion carried."

5. Direct participants to the Large Group Role-Play: Running A Membership Meeting on page 31. Explain that we will try to simulate a local membership meeting using the 10 Suggested Rules and following the script that begins on page 32. Ask for new local presidents and vice presidents to raise their hands and explain that at various points you'll say "freeze" and have one of them tag team into the role-play and take over as Chair of the meeting. You might also say "freeze" to stop the action and conduct a large group discussion of what's going on and what the Chair's options are at this point.
6. Ask for volunteers to play the parts of the other officers: Vice President, Recording Secretary, Financial Secretary, Treasurer, Trustees (3), Guide, and Guard (2). If you're number of participants is limited, assemble a set of officers based on the participants own titles, but making sure to have the parts of President, Recording Secretary, Financial Secretary, and Treasurer covered (those not covered can be recorded as absent from the meeting).
7. Arrange for one volunteer to play the part of one of the local's WOS members who will attempt to move for action based on the District WOS Call Letter that the Recording Secretary will read. Make sure she has another participant ready to "second" her motion.
8. If a staff representative is attending the workshop ask him or her if he or she would like to role-play providing the "Report of the International Representative."
9. Distribute sample meeting minutes, financial secretary and treasurer reports to all participants and a copy of the District WOS Call Letter to the member playing the part of the Recording Secretary. These are to be used by the various officers to present their reports.
10. Have the participants playing local officers assemble at the front of the room. Select the first new local president or vice president to start the role-play and hand him or her the gavel.
11. Finally, explain that you too will play a part in the meeting, that of a disgruntled member with certain concerns regarding district conferences. Have the first president call the meeting to order and get started.
12. You'll likely get as far as the Recording Secretary reading the WOS Call Letter at which point the WOS member should raise her hand to be recognized and make her motion to the effect that the Local should send all five current members of the WOS Committee to the District WOS Conference. Let the President decide on how to handle this motion and then call "freeze" to discuss with the large group what the President did and what his or her options were with regard to this motion. Tag team another volunteer President into the role-play and have the meeting resume at the point you stopped.

13. These rest of the order of business should be followed per the Script, but at some point the WOS member's motion should be on the floor and you – in the role of a disgruntled member -- should now offer an amendment along the lines of "We spend too much money on these useless district conferences, so I move to amend this motion to send zero members to this conference." The Chair should rule your motion "out of order" because it is not an amendment but in fact an attempt to defeat the original motion (if he or she doesn't, you may want to call "freeze" and discuss why this is out of order). Next – again as the disgruntled member -- attempt to move to "table" the sister's motion in order for the local to review how much it's spent on WOS events versus other important events. Chair should ask for a "second," if someone offers a "second" then take a vote by show of hands to determine what happens next.
14. Once you've completed the "Order of Business" conduct a short large group discussion regarding how the meeting went and to answer any concerns or issues regarding membership meetings. If time allows, ask participants for any ideas or suggestions on how membership meetings might be improved with the goal of boosting attendance.

Session 6: Empowering the Members Through Effective Local Union Committees

- **Teaching Style: Small group exercise & large group discussion.**
- **Time Needed: 30 minutes**
- **Materials Needed: Participant Workbooks.**
- **Goal: That participants assess the current state of their local or unit's committees, recognize the role that committees play in engaging the rank-and-file, and discuss strategies for reinvigorating both their standing and special committees.**

Steps:

1. Read aloud (or present from your own outline) the material on pages 36-37 of the Workbook that recaps the committee structure under the USW governing documents for stand-alone and amalgamated locals.
2. Review the instructions for the Small Group Exercise: Local/Unit Committees Assessment on Page 37. Have participants from the same local unions work together in groups of 3 to 8. Participants who are attending alone should be grouped together or assigned to another group to avoid having any participants working individually.
3. After 15 minutes (including a two-minute warning) facilitate a large group discussion by asking for volunteers to share their answers (formal report backs aren't necessary).
Possible talking points:

- *Regarding Question 1: Don't be discouraged if not all your standing committees are up and running. It is a common problem among locals/units and requires constant time and attention. Remind participants that committees are an important vehicle for involving rank-and-file members in the life of the Union.*
- *Regarding Question 2: Assigning certain officers (for example, Guides or Guards) to chair particular committees can be a way of giving these elected officers more responsibility and groom them for higher office in the future.*
- *Regarding Question 3: If it's the case that a handful of members are performing most of the officer and grievance committee work AND serving on standing committees, there's a greater chance of burning them out. A key part of union leadership is recruiting rank-and-file members to these committees. This avoids burnouts, involves more members in the life of the union, and develops leaders for the future.*

Session 7: Workshop Summary & Final Thoughts

- **Teaching Style:** Large group discussion.
- **Time Needed:** 15 minutes
- **Materials Needed:** Participant Workbooks
- **Goal:** That participants review the workshop's objectives presented at the outset of the workshop and share their impressions of where the workshop achieved its objectives as well as areas that may need follow-up in the form of more information.

Steps:

1. Review with participants each of the objectives presented at the outset of the workshop and ask for volunteers to share whether they feel the objective was met. Where participants feel the workshop fell short on a particular objective, ask what might help them (other than actual experience as officers, which only they can provide).
2. Make sure to have contact information for any individuals who require follow-up regarding questions you were unable to answer during the course of the workshop.
3. Thank the participants for their hard work and for their invaluable service as USW officers. Distribute your business card and encourage them to call or email should they have any further questions regarding any of the topics discussed in the workshop.